

MONTANA STATE LIBRARY

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Manual for voluntary certification progr



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**MANUAL FOR
VOLUNTARY CERTIFICATION PROGRAM**

AND

**MONTANA PUBLIC LIBRARY
RECOGNITION PROGRAM**

**MONTANA STATE LIBRARY
P.O. BOX 201800
1515 EAST SIXTH AVENUE
HELENA, MONTANA 59620-1800**

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I. VOLUNTARY CERTIFICATION PROGRAM

A. INTRODUCTION

With the *Manual for the Voluntary Certification Program for Public Librarians and Montana Public Library Recognition Program*, Montana has a system established to certify, on a voluntary basis, librarians and library staff members. The importance to the state cannot be underestimated, for there are few opportunities offered currently to public librarians to be recognized for "going the extra mile" to keep up with the field. The certification process embodied in this document will provide the means by which librarians can improve their skills, boards can require and recognize such efforts on the part of their staffs, and, ultimately, library services to all Montanans will be improved. The latter is really the most important point to be made. If the use of the *Manual* accomplishes this, it will have been worth all the effort that went into it.

The second portion of this dual publication provides a way for librarians, library boards, library federations to recognize the contributions of volunteers, trustees, and paid library staff who make significant contributions to public libraries. This recognition process is outside the more formal certification process mentioned above, but still recognizes efforts on the part of these people to seek out basic and continuing education related to libraries and highlights significant other contributions made to the library. This recognition process offers a statewide structure for such recognition.

II. VOLUNTARY CERTIFICATION

A. WHY VOLUNTARY CERTIFICATION?

The goal of the voluntary certification program is to:

- improve library service throughout the state;
- motivate librarians and library staff members to acquire, maintain, and develop their skills through basic and continuing education;
- recognize librarians and library staff who, on a continuing basis, update their knowledge and skills in order to provide better library services to their patrons;
- improve the public image of librarians and libraries;
- provide guidelines for governing boards to use to select and retain personnel.

The voluntary certification program will assist in providing for increased direction and uniformity in continuing education programs for librarians across the state and in identifying and recruiting qualified librarians for library positions.

B. WHO SHOULD BECOME CERTIFIED?

This certification program is **voluntary**. Local governing boards may require certification of designated staff members. Participants in the certification program's continuing education could be, but are not limited to:

1. the library director;
2. staff members who are given regularly assigned duties in the areas of administrative services, public services, children and youth services, and technical services; and
3. other library interested persons. (e.g. trustees, retired librarians)

C. VOLUNTARY CERTIFICATION LEVEL REQUIREMENTS

LEVEL	REQUIREMENTS
LEVEL I	Graduate Degree in Library or Information Science from an Institution of Higher Education Accredited by the American Library Association
LEVEL II	A Bachelor's Degree from an Accredited College or University *, and 15 Semester Hours or 20 Quarter Hours in Library Education from an Accredited College or University *, or A Minimum of a Minor in Library Science from an Accredited College University *, and 40 Continuing Education Contact Hours **
LEVEL III	A Bachelor's Degree from an Accredited College or University *, and 40 Continuing Education Contact Hours ** [OR] An Associate Degree from an Accredited College or University *, and 5 Years Work *** as a Library Director within the Last 10 Years, and 40 Continuing Education Contact Hours **

LEVEL IV	High School Diploma or G.E.D., and 60 Semester Hours or 90 Quarter Hours of College Credit **, and 40 Continuing Education Contact Hours ** <div style="text-align: center;">[OR]</div> High School diploma or G.E.D., and 5 Years of Library Work *** at the Level of a Library Technical Assistant or Higher (See Glossary for Definition) within the Last 10 Years, and 40 Continuing Education Contact Hours **
LEVEL V	High School Diploma or G.E.D., and 2 Years of Library Work *** at the Level of a Library Technical Assistant or Higher (See Glossary for Definition) within the Last 5 Years, and 40 Continuing Education Contact Hours **

* College credit for Levels II through V must be from an institution accredited by a state, regional, or national accrediting association.

** Forty (40) continuing education contact hours, including at least five (5) contact hours in each of the following four specified areas are required: 1) Library Administration; 2) Library Services to the Public; 3) Collection Management; and 4) Technical Services & Technology.

For more information on the continuing education contact hours see Continuing Education Requirements on page 19 (from the Manual for Voluntary Certification Program).

*** For the purposes of this manual a year of work is considered a minimum of 1040 hours per year.

D. SUGGESTED LEVELS FOR VOLUNTARY CERTIFICATION OF LIBRARY DIRECTORS BASED ON POPULATION SERVICE AREAS OF LIBRARIES

LEVEL	POPULATION SERVICE AREA
LEVEL I *	35,000 OR OVER
LEVEL II	15,000 - 34,999
LEVEL III	5,000 - 14,999
LEVEL IV	2,500 - 4,999
LEVEL V	0000 - 2,499

* Level I for Federation Headquarters Libraries is required by the Montana State Library Commission.

E. HOW TO APPLY FOR VOLUNTARY CERTIFICATION

To become certified, follow the instructions below. The procedures for voluntary certification also apply to individuals upgrading to a higher level of certification. You can upgrade at any time you meet the requirements for the next level. Certificates are valid for five years.

1. INSTRUCTIONS

- Read this entire manual carefully. The answers to most questions are contained in the manual. Complete the Application Form for Voluntary Certification on page 9 using the directions on the form. It should be typed or printed using black ink. Photocopies are acceptable. You need only photocopy the requested level of certification. This is true of the other forms as well.
- If it is required for your certification level, send an official transcript to the Voluntary Certification Program, Montana State Library, P.O. Box 201800, Helena, MT 59620-1800.
- If it is required for your certification level, attach copies of records of attendance of continuing education activities. (See pages 27-30).
- Include payment of \$10.00 certification fee. This certification fee is a processing fee. Make checks payable to the Montana State Library.
- Submit the completed application form, required materials, and your payment to the Voluntary Certification Program at the address listed at the bottom of this page.
- It is your responsibility to keep copies of records pertaining to your certification. These records are valuable for validation purposes, and also as planning tools to identify your learning needs and decide how to meet them.
- If you have questions that cannot be answered by reading the manual, call or write: Voluntary Certification Program, Montana State Library, P.O. Box 201800, Helena, Montana 59620-1800, 406-444-5349

F. APPLICATION FORM FOR VOLUNTARY CERTIFICATION

Directions: Complete General Information and Certification section which pertains to the Level for which you are applying for certification or upgrading your certification level. Refer to the contents of the Manual for Voluntary Certification for Librarians for certification requirements. If you have questions that cannot be answered by reading the manual, call the Voluntary Certification Program, Montana State Library, at 406-444-5349.

Attach an extra sheet if necessary. Include a payment of \$10.00 certification fee. Make checks payable to Montana State Library. Send a copy of an official transcript to the address below, if required. Attach copies of records of attendance of continuing education activities, if required.

Submit completed form and attachments to: VOLUNTARY CERTIFICATION PROGRAM, MONTANA STATE LIBRARY, P.O. Box 201800, HELENA, MONTANA 59620-1800.

GENERAL INFORMATION		DATE:
NAME:		
Last	First	Middle Initial
MAILING ADDRESS:		
CITY, STATE, ZIPCODE:		
CURRENT POSITION:		
LIBRARY WHERE CURRENTLY EMPLOYED:		
LIBRARY ADDRESS:		
CITY, STATE, ZIPCODE:		
TELEPHONE:		
CERTIFICATION LEVEL REQUESTED: (Circle One)		
I	II	III IV V



G. APPLICATION LEVELS FOR VOLUNTARY CERTIFICATION

Photocopy the requested level of certification and provide the needed information to the Voluntary Certification Program.

LEVEL I -- GRADUATE DEGREE IN LIBRARY OR INFORMATION SCIENCE FROM AN INSTITUTION OF HIGHER EDUCATION ACCREDITED BY THE AMERICAN LIBRARY ASSOCIATION:
Name of Institution * :
Dates Attended:

* AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM IS REQUIRED.

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.
I UNDERSTAND THAT ANY FALSE STATEMENTS MAY RESULT IN DENIAL OR REVOCATION OF THE CERTIFICATE.

APPLICANT SIGNATURE

DATE SIGNED

Note: Certificates are valid for five years.

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Photocopy the requested level of certification and provide the needed information to the Voluntary Certification Program.

LEVEL II -- BACHELOR'S DEGREE FROM AN ACCREDITED COLLEGE OR UNIVERSITY:		
Name of Institution * :		
Dates Attended:		
AND -- 15 SEMESTER HOURS OR 20 QUARTER HOURS OF COLLEGE CREDIT IN LIBRARY EDUCATION:		
Name of Institution * :		
Dates Attended:		
OR -- A MINIMUM OF A MINOR IN LIBRARY SCIENCE:		
Name of Institution * :		
Dates Attended:		
AND -- 40 CONTINUING EDUCATION CONTACT HOURS: REQUIRES AT LEAST FIVE (5) HOURS IN EACH OF THE FIRST FOUR CONTINUING EDUCATION AREAS.		
Continuing Education Areas **	With Prior Approval	Without Prior Approval
Library Administration		
Library Services to the Public		
Collection Management		
Technical Services & Technology		
Other		
TOTAL CONTACT HOURS		

* AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM IS REQUIRED.

**** ATTACH THE SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FORM FOR PROGRAMS WITH PRIOR APPROVAL AND THE APPROVED COPY OF THE FORM FOR PROGRAMS WITHOUT PRIOR APPROVAL. INCLUDE EITHER A CERTIFICATE OF ATTENDANCE FOR THE ACTIVITY OR THE INSTRUCTOR'S SIGNATURE ON THESE FORMS.**

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT ANY FALSE STATEMENTS MAY RESULT IN DENIAL OR REVOCATION OF THE CERTIFICATE.

APPLICANT SIGNATURE

DATE SIGNED

Note: Certificates are valid for five years.



Photocopy the requested level of certification and provide the needed information to the Voluntary Certification Program.

LEVEL III -- BACHELOR'S DEGREE FROM AN ACCREDITED COLLEGE OR UNIVERSITY:	
Name of Institution * :	
Dates Attended:	
OR -- AN ASSOCIATED DEGREE FROM AN ACCREDITED COLLEGE OR UNIVERSITY:	
Name of Institution * :	
Dates Attended:	
AND -- 5 YEARS WORK AS A LIBRARY DIRECTOR WITHIN THE LAST 10 YEARS:	
Name of Employer:	
Address:	
City, State, Zipcode:	
Telephone No.:	Dates Employed:
AND -- 40 CONTINUING EDUCATION CONTACT HOURS: REQUIRES AT LEAST FIVE (5) HOURS IN EACH OF THE FIRST FOUR CONTINUING EDUCATION AREAS.	

* AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM IS REQUIRED.

**** ATTACH THE SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FORM FOR PROGRAMS WITH PRIOR APPROVAL AND THE APPROVED COPY OF THE FORM FOR PROGRAMS WITHOUT PRIOR APPROVAL. INCLUDE EITHER A CERTIFICATE OF ATTENDANCE FOR THE ACTIVITY OR THE INSTRUCTOR'S SIGNATURE ON THESE FORMS.**

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.
I UNDERSTAND THAT ANY FALSE STATEMENTS MAY RESULT IN DENIAL OR REVOCATION OF THE CERTIFICATE.

APPLICANT SIGNATURE

DATE SIGNED

Note: Certificates are valid for five years.

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Photocopy the requested level of certification and provide the needed information to the Voluntary Certification Program.

LEVEL IV -- HIGH SCHOOL DIPLOMA OR G.E.D.:		
Place:		Date Received:
AND -- 60 SEMESTER HOURS OR 90 QUARTER HOURS OF COLLEGE CREDIT:		
Name of Institution * :		
Dates Attended:		
OR -- 5 YEARS OF LIBRARY WORK WITHIN THE LAST 10 YEARS:		
Name of Employer:		
Address:		
City, State, Zipcode:		
Telephone No.:		Dates Employed:
AND -- 40 CONTINUING EDUCATION CONTACT HOURS: REQUIRES AT LEAST FIVE (5) HOURS IN EACH OF THE FIRST FOUR CONTINUING EDUCATION AREAS.		
Continuing Education Areas **	With Prior Approval	Without Prior Approval
Library Administration		
Library Services to the Public		
Collection Management		
Technical Services & Technology		
Other		
TOTAL CONTACT HOURS		

* AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM IS REQUIRED.

**** ATTACH THE SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FORM FOR PROGRAMS WITH PRIOR APPROVAL AND THE APPROVED COPY OF THE FORM FOR PROGRAMS WITHOUT PRIOR APPROVAL. INCLUDE EITHER A CERTIFICATE OF ATTENDANCE FOR THE ACTIVITY OR THE INSTRUCTOR'S SIGNATURE ON THESE FORMS.**

I hereby certify that the above information is true and correct to the best of my knowledge. I understand that any false statements may result in denial or revocation of the certificate.

Applicant Signature

Date Signed

Note: Certificates are valid for five years.



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Photocopy the requested level of certification and provide the needed information to the Voluntary Certification Program.

LEVEL V -- HIGH SCHOOL DIPLOMA OR G.E.D.:		
Place:		Date Received:
AND -- 2 YEARS OF LIBRARY WORK WITHIN THE LAST 5 YEARS:		
Name of Employer:		
Address:		
City, State, Zipcode:		
Telephone No.:		Dates Employed:
AND -- 40 CONTINUING EDUCATION CONTACT HOURS: REQUIRES AT LEAST FIVE (5) HOURS IN EACH OF THE FIRST FOUR CONTINUING EDUCATION AREAS.		
Continuing Education Areas **	With Prior Approval	Without Prior Approval
Library Administration		
Library Services to the Public		
Collection Management		
Technical Services & Technology		
Other		
TOTAL CONTACT HOURS		

* AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM IS REQUIRED.

**** ATTACH THE SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FORM FOR PROGRAMS WITH PRIOR APPROVAL AND THE APPROVED COPY OF THE FORM FOR PROGRAMS WITHOUT PRIOR APPROVAL. INCLUDE EITHER A CERTIFICATE OF ATTENDANCE FOR THE ACTIVITY OR THE INSTRUCTOR'S SIGNATURE ON THESE FORMS.**

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT ANY FALSE STATEMENTS MAY RESULT IN DENIAL OR REVOCATION OF THE CERTIFICATE.

APPLICANT SIGNATURE

DATE SIGNED

Note: Certificates are valid for five years.



III. RECERTIFICATION

A. GUIDELINES FOR RECERTIFICATION

In order to be recertified at your present level, periodic renewals are required. The process is described below. You can upgrade at anytime you meet the requirements for the next level.

1. If you became certified in 1992:
 - a. You will need to renew your certificate in 1997 and then every five (5) years thereafter. You have until December 31, 1997 to have your certificate renewed, and then you will have until December 31st of every 5th year thereafter to apply for recertification. If your certificate lapses, you must reapply for certification using the Application Form for Voluntary Certification, and you will be subject to the guidelines for 1993 and after.
 - b. Individuals requesting recertification in all levels must have participated in 40 contact hours of approved continuing education within the last five (5) years, including at least five (5) hours in each of the four areas discussed on pages 19-21 (from the Manual for Voluntary Certification Program).
2. If you became certified in 1993 or recertified after 1993:
 - a. You will need to renew your certificate every five years. You will have until December 31st of the 5th year to apply for recertification. If your certificate lapses, you must reapply for certification using the Application Form for Voluntary Certification, and you will be subject to the guidelines for 1993 and after.
 - b. Individuals requesting recertification in all levels must have participated in 40 contact hours of approved continuing education within the last five (5) years, including at least five (5) hours in each of the four areas discussed on pages 19-21 (from the Manual for Voluntary Certification Program).

You can upgrade at any time you meet the requirements for the next level.

If you are upgrading to a higher level, use the Application Form for Voluntary Certification on page 9 (from the Manual for Voluntary Certification Program) and follow the instructions on page 8 (from the Manual for Voluntary Certification Program).

Certificates are valid for five (5) years.

LIFETIME CERTIFICATES WILL NOT BE ISSUED AT ANY LEVEL.

B. RECERTIFICATION REQUIREMENTS

LEVEL	REQUIREMENTS
LEVEL I	40 Continuing Education Contact Hours within the last 5 years*
LEVEL II	40 Continuing Education Contact Hours within the last 5 years*
LEVEL III	40 Continuing Education Contact Hours within the last 5 years*
LEVEL IV	40 Continuing Education Contact Hours within the last 5 years*
LEVEL V	40 Continuing Education Contact Hours within the last 5 years*

* Forty (40) continuing education contact hours, including at least five (5) contact hours in each of the following four specified areas, are required: 1) Library Administration; 2) Library Services to the Public; 3) Collection Management; and 4) Technical Services & Technology.

C. HOW TO APPLY FOR RECERTIFICATION

Instructions

1. Read this entire manual carefully. The answers to most questions are contained in the manual.
2. Complete the Recertification Application Form on page 17 (from the Manual for Voluntary Certification Program) using the directions on the form. It should be typed or printed using black ink. Photocopies are acceptable. This is true of the other forms as well.
3. If required for recertification, send an official transcript to the Voluntary Certification Program, Montana State Library, P.O. Box 201800, Helena, MT 59620-1800.
4. Attach copies of records of attendance of continuing education activities. (See pages 27-30 from the Manual for Voluntary Certification Program)
5. Include payment of \$10.00 recertification fee. This recertification fee is a processing fee. Make checks payable to the Montana State Library.
6. Submit the completed application form, required materials, and your payment to the Voluntary Certification Program at the address listed at the bottom of this page.
7. It is your responsibility to keep copies of records pertaining to your certification. These records are valuable for validation purposes, and also as planning tools to identify your learning needs and decide how to meet them.
8. If you have questions that cannot be answered by reading the manual, call or write: Voluntary Certification Program, Montana State Library, P.O. Box 201800, Helena, Montana 59620-1800, 406-444-5349.

D. RECERTIFICATION APPLICATION FORM

DIRECTIONS: THIS FORM IS FOR RECERTIFICATION AT YOUR CURRENT LEVEL. IF YOU ARE CHANGING YOUR CERTIFICATION LEVEL, COMPLETE AN APPLICATION FORM FOR VOLUNTARY CERTIFICATION (PAGE 9 FROM THE MANUAL FOR VOLUNTARY CERTIFICATION PROGRAM), INSTEAD OF THIS FORM.

Your certificate must be renewed every five (5) years. You have until December 31st of your 5th year to be recertified. Include payment of \$10.00 recertification fee. Make checks payable to Montana State Library. Send a copy of an official transcript to the Voluntary Certification Program, if there have been changes since your initial certification. Attach the Summary of Continuing Education Attendance Records Form, the additional form for Programs With Prior Approval, and copies of any previously approved forms for Programs Without Prior Approval. Attach an extra sheet if necessary. Keep copies of all information pertinent to certification and recertification for your records.

Fill out all sections of the form. Please type or print using black ink. If you have questions that cannot be answered by reading the manual, call the Voluntary Certification Program at Montana State Library at 406-444-5349. Submit with completed form to:

Voluntary Certification Program
Montana State Library
P.O. Box 201800
Helena, Montana 59620-1800

GENERAL INFORMATION		
DATE:		
NAME:		
Last	First	Middle Initial
MAILING ADDRESS:		
CITY, STATE, ZIPCODE:		
CURRENT POSITION:		
LIBRARY WHERE CURRENTLY EMPLOYED:		
LIBRARY ADDRESS:		
CITY, STATE, ZIPCODE:		
TELEPHONE:		

CURRENT CERTIFICATION LEVEL:	(Circle One)			
I	II	III	IV	V



WHAT DATE WERE YOU LAST CERTIFIED? (List Month and Year)

40 CONTINUING EDUCATION CONTACT HOURS WITHIN THE LAST FIVE (5) YEARS: REQUIRES AT LEAST FIVE (5) HOURS IN EACH OF THE FIRST FOUR CONTINUING EDUCATION AREAS.

Continuing Education Areas *	With Prior Approval	Without Prior Approval
Library Administration		
Library Services to the Public		
Collection Management		
Technical Services & Technology		
Other		
TOTAL CONTACT HOURS		

*** ATTACH THE SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FORM FOR PROGRAMS WITH PRIOR APPROVAL AND THE APPROVED COPY OF THE FORM FOR PROGRAMS WITHOUT PRIOR APPROVAL. INCLUDE EITHER A CERTIFICATE OF ATTENDANCE FOR THE ACTIVITY OR THE INSTRUCTOR'S SIGNATURE ON THESE FORMS.**

COLLEGE CREDIT: (AN OFFICIAL TRANSCRIPT SENT TO THE VOLUNTARY CERTIFICATION PROGRAM, IF THERE HAVE BEEN CHANGES SINCE INITIAL CERTIFICATION.)

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.
I UNDERSTAND THAT ANY FALSE STATEMENTS MAY RESULT IN DENIAL OR REVOCATION OF THE CERTIFICATE.

APPLICANT SIGNATURE

DATE SIGNED



IV. CONTINUING EDUCATION

A. CONTINUING EDUCATION REQUIREMENTS

The Screening Board is an ad hoc committee of the Montana State Library Commission established to review all requests for validation of continuing education activities for voluntary certification or recertification purposes. The following describes two ways an individual can receive continuing education credit.

1. An individual may attend a program that has received prior approval from the Screening Board. It is the responsibility of the program provider to apply to the Screening Board for program approval. It is the responsibility of the individual to obtain a certificate of attendance or to get the instructor's signature (See page 27 from the Manual for Voluntary Certification Program.) and submit it to the Screening Board when applying for certification or recertification.
2. Within 90 days after attending a program that has not received prior approval, an individual may submit the Form for Programs Without Prior Approval (See Page 29 from the Manual for Voluntary Certification Program.) and proof of program attendance to the Screening Board. The Screening Board will approve or disapprove the program. Continuing education may be on any topic that is relevant to library theory and practice. This would especially apply to programs offered outside the state of Montana, since these providers would not be seeking prior approval of their programs or courses from the Screening Board.

The Screening Board's Approval of continuing education credits will take into consideration the fact that certification requires continuing education contact hours in each of the following four specified areas: 1) Library Administration; 2) Library Services to the Public; 3) Collection Management; and 4) Technical Services & Technology.

For more information on continuing education requirements see Validation of Contact Hours, page 22 (from the Manual for Voluntary Certification Program) and Conversion Chart for Continuing Education Contact Hours, page 23 (from the Manual for Voluntary Certification Program).

B. LIBRARY CONTINUING EDUCATION INTRODUCTION

The Montana Voluntary Certification Program for librarians has identified the following as the four most important continuing education topics for librarians: 1) Library Administration; 2) Library Services to the Public; 3) Collection Management; and 4) Technical Services & Technology.

The outline summary of each topic below lists specific areas in which individuals should develop knowledge, skills, and/or abilities. This continuing education outline has been developed as a guideline for: continuing education providers for use in developing workshops; individuals in planning their ongoing continuing education activities; and local library boards to review the qualifications of librarians and library staff.

1. LIBRARY ADMINISTRATION

A. GOVERNANCE

Roles of librarian and library board
Mission of the library
Library's governing structure and responsibilities
Role of the library, organizationally and legally, within the community's governance structure
Library policies and procedures
Funding and budget issues
Library laws and the legislative process
Roles of the Montana Library Commission, the Advisory Council, and the Montana Library Association

B. COOPERATION

Cooperation among all community organizations and agencies and the library
Resources and services available through cooperative arrangements with local libraries, the federation system, the Montana Library Commission, the Advisory Council, Montana Library Association, regional and national libraries and library networks, and with other units of government

C. THE PLANNING PROCESS

The planning process in effective library administration: 1) Structuring the process; 2) Community analysis; 3) Selecting roles; 4) Mission statement; 5) Goals and objectives; 6) Activities to implement goals and objectives; 7) Written documentation; and 8) Evaluation
Responsibilities, resources, and schedules in the library planning process
Library services in relationship to community needs
Marketing plans

D. PERSONNEL MANAGEMENT

Legality of personnel policies
Personnel and organizational structure

E. PHYSICAL FACILITIES

Planning and management of physical facilities, including disaster preparedness
Library goals, activities, and functions in relation to the physical layout of the library

2. LIBRARY SERVICES TO THE PUBLIC

Staff attitudes as a reflection of the library's basic philosophy of service
User's guidance services, including:
1) Instruction in the use of the library;
2) Instruction in the use of library tools and equipment; 3) Helping users in the choice of print and nonprint media;
4) Education through special activities and programs; and 5) Displays, bibliographies, book lists, etc.
Use of the catalog as a location tool and its relationship to the physical arrangement of material in the library, which includes: 1) The Classification Systems; 2) Filing rules;
3) Arrangement of materials on the shelves; 4) Boolean and/or Keyword Searching
Library policies dealing with reference questions, circulation, and interlibrary loan
Confidentiality and ethics in providing services to patrons
Copyright of print and audiovisual media
Non-judgmental philosophy of staff in dealing with controversial information requests
Problem patrons and the resulting stress on staff
The library as a lifelong learning institution within the community

Special services and programs designed to meet the needs and interests of the community

Needs and interests of different age groups in the community

Cooperative efforts between the public library, the school library, other area libraries or information services, and community agencies and organizations to enhance library services

Interlibrary loan networks to identify resources and materials not available locally

Reference services and their relationship to the mission and goals of the library

Reference materials and resources

Reference interviews

Information requests and in-house reference sources used to respond to those requests

Information resources regionally or nationally that provide external sources of reference information

3. COLLECTION MANAGEMENT

Written collection management policy approved by the library board and/or school board

Library Bill of Rights and the significance of intellectual freedom and censorship for libraries

Selection criteria appropriate for the community and selection of materials

Appropriate materials selection tools and their advantages and limitations

Collection evaluation with materials identified for retention, replacement, rebinding, and duplication

Collection evaluation to assess strengths and weaknesses for planning for future acquisitions

Importance of weeding a collection and developing criteria and a workflow plan to accomplish a weeding project

Need for various formats of material for the community

Methods and sources available for acquiring library materials

Orderly and effective expenditure of budgeted funds

4. TECHNICAL SERVICES & TECHNOLOGY

Organization of collections into meaningful arrangements

Function of a catalog and its relationship to the accessibility of material; understanding of Boolean and Keyword Searching

Examination of materials and the development of the information obtained into a bibliographic record that meets accepted library standards

Information used as access points on a bibliographic record and use of those access points to enhance a patron's ability to locate library material

Reasons for classifying library materials and the different forms of author notation

Alternatives to original cataloging and card production

Filing procedures and the need for maintaining cataloging files

Methods used to process new materials

Maintenance of the collection through inventory control

The importance of planning and time management in the processing of materials

Technology: 1) Automation and the delivery of library services; 2) Automation and library administration; and 3) Roles of other technologies, such as telefacsimile, cable TV, distance learning, satellite transmission, and the internet

C. VALIDATION OF CONTACT HOURS

The Screening Board will validate continuing education contact hours required for certification or recertification.

1. LEARNING ACTIVITIES THAT HAVE RECEIVED PRIOR APPROVAL FROM THE SCREENING BOARD:

Learning Activities that have received prior approval from the Screening Board, will be validated at the time an individual applies for certification or recertification. Along with the application for certification or recertification, submit the following information to the Screening Board to verify the completion of a learning activity:

- a. Learning activities (conferences, institutes, workshops) awarded CEU's : 1) Submit Summary of Continuing Education Records and related forms on page 27 (from the Manual for Voluntary Certification Program).
- b. Informal programs not awarded CEU's such as lectures, seminars, workshops, library/information/media association meetings (program sessions only), study groups (3 persons minimum), video presentations: 1) Submit Summary of Continuing Education Records and related forms on page 27 (from the Manual for Voluntary Certification Program).

Please note that video presentations are limited to only five (5) hours of continuing education contact hours.

2. ACADEMIC COURSES TAKEN AT ACCREDITED INSTITUTIONS:

Formal courses awarded academic credit will be validated at the time an individual applies for certification or recertification. Along with the application for certification or recertification, submit the following information to the Screening Board to verify the completion of a course.

- a. Formal courses awarded academic credit: 1) Copy of an official transcript sent to the Voluntary Certification Program.

3. OTHER LEARNING ACTIVITIES THAT HAVE NOT RECEIVED PRIOR APPROVAL FROM THE SCREENING BOARD:

For any other learning activities that have not received prior approval from the Screening Board, submit the following to Screening Board within 90 days after attending the activity.

- a. Any other learning activities that have not received prior approval from the Screening Board: 1) Submit the Summary of Continuing Education Attendance Records For Programs Without Prior Approval Form on page 29 (from the Manual for Voluntary Certification Program) to the Voluntary Certification Program.

4. COURSES PRESENTED BY LIBRARIANS

Librarians may be given credit for courses, workshops, or learning activities that they present. Librarians may obtain prior approval from the Screening Board or may request approval within 90 days of presenting the learning activity. To request approval, submit the following to the Screening Board.

- a. For prior approval of courses presented by librarians: 1) Submit the Continuing Educations Provider's Application for Approval of Programs with a Cover Letter requesting Credit for yourself.
- b. Any learning activity that has not received prior approval from the Screening Board: 1) Submit the Continuing Educations Provider's Application for Approval of Programs with a Cover Letter requesting Credit for yourself.

IF AN ACTIVITY IS VALIDATED BY THE SCREENING BOARD, KEEP THE RECORD OF THEIR APPROVAL AND SUBMIT THIS INFORMATION WHEN APPLYING FOR CERTIFICATION OR RECERTIFICATION.

If you have questions that cannot be answered by reading the manual, write: VOLUNTARY CERTIFICATION PROGRAM, MONTANA STATE LIBRARY, P.O. BOX 201800, HELENA, MONTANA 59620-1800, OR CALL 406-444-5349.

D. CONVERSION CHART FOR CONTINUING EDUCATION CONTACT HOURS

A program that qualifies for continuing education contact hours may include academic courses, home study courses, conferences, institutes, seminars, workshops, lectures, program sessions of library/information/media association meetings, and study groups.

TYPE OF ACTIVITY	UNIT OF MEASURE	CONTACT HOURS
1. Formal Activities:		
a. Academic courses, including short courses and home study courses	1 semester hour credit 1 quarter hour credit	16 11
b. Conferences, institutes, seminars	1 continuing education unit (CEU)	10
2. Informal Group Activities:		
a. Lectures, seminars workshops, (when no CEU's are given)	50 minutes	1
b. Library/information/media association meetings (program sessions only)	50 minutes	1
c. Study groups (3 persons minimum)	50 minutes	1

V. CRITERIA FOR APPROVAL OF PROGRAMS

These criteria are based on A Program for Quality in Continuing Education for Information, Library, and Media Personnel by the National Council on Quality Continuing Education for Information, Library, Media Personnel. They are the criteria a program must meet in order to receive prior approval by the Screening Board. They also describe what individuals should consider when they are evaluating the quality of a program they may attend.

A. CRITERIA

1. The specific needs of the target audience have been assessed.
2. Learning objectives have been stated in one or more of the following areas: a. changes in attitude and approach to the solution of problems; b. acquisition (or mastery) of new knowledge or the revision of outdated knowledge in specific skills, techniques, and procedures.
3. The program is systematically designed to meet the stated objectives and is accurately advertised.
4. The instructional staff are qualified by education or experience to provide quality instruction in the relevant subject area(s).
5. Programs must have an evaluation component.
6. There is provision for individual participant registration which will include information required for record keeping and reporting, such as a transcript or a record of attendance.

ACCREDITED INSTITUTIONS OFFERING LIBRARY COURSES ARE NOT REQUIRED TO GET PRIOR APPROVAL FOR FORMAL COURSE OFFERINGS.

IT IS THE RESPONSIBILITY OF THE INDIVIDUALS TO OBTAIN INFORMATION FROM THE PROVIDER ON WHETHER THE PROGRAMS THEY PLAN TO ATTEND HAVE BEEN APPROVED BY THE SCREENING BOARD. IF POSSIBLE, PUBLICITY ABOUT PROGRAMS SHOULD INDICATE WHETHER THE PROGRAMS HAVE BEEN APPROVED.

B. CONTINUING EDUCATION PROVIDERS APPLICATION FOR APPROVAL OF PROGRAMS

A statewide Screening Board will approve specific continuing education **programs** rather than **providers**, upon application by the providers. Providers include, but are not limited to:

1. Montana State Library;
2. Montana Library Federations;
3. individual libraries;
4. educational institutions (public and private colleges and universities, community colleges, and public schools);
5. library associations (American Library Association (ALA), Mountain Plains Library Association (MPLA), Montana Library Association (MLA), and Pacific Northwest Library Association (PNLA), and others;
6. the private sector.

**CONTINUING EDUCATION PROVIDERS
APPLICATION FOR APPROVAL OF PROGRAMS ****

Continuing education providers should apply at least one (1) month in advance for approval of the programs they plan to present by completing this form (pages 25 & 26 from the Manual for Voluntary Certification Program) and sending it to the VOLUNTARY CERTIFICATION PROGRAM, MONTANA STATE LIBRARY, P.O. Box 201800, HELENA, MONTANA 59620-1800.

GENERAL INFORMATION	Date:
Provider:	
Provider's Representative:	
Mailing Address:	
Current Position of Representative:	

LEARNING ACTIVITY DESCRIPTION	(Attach a sheet if necessary.)
1. Program Information:	
Title:	
Date:	
Time(s):	

2. Presenter(s) and Qualifications:
--

3. Target Audience:

4. Objectives:



5. Program Description:

6. Total Contact Hours:

Continuing Education Areas	Contact Hours
Library Administration	
Library Services to the Public	
Collection Management	
Technical Services & Technology	
Other (please specify)	
Total Contact Hours	

7. How will the program be advertised?

8. How will the program be evaluated?

**** Formal library science courses awarded academic credit from accredited institutions do not require approval from the Screening Board.**

I HEREBY CERTIFY THAT THE ABOVE INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

IN ADDITION, I CERTIFY THAT A RECORD OF ATTENDANCE WILL BE MAINTAINED FOR CERTIFICATION REFERRAL.

PROVIDER'S REPRESENTATIVE (SIGNATURE)

DATE SIGNED

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C. SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FOR PROGRAMS WITH PRIOR APPROVAL

These forms record the general information related to attending continuing education activities. It is the responsibility of the individuals to obtain information from the provider on whether the programs they plan to attend have been approved by the Screening Board. Fill in the appropriate information and obtain a signature from either the instructor or the provider of the program. Put the total of contact hours for that program in the appropriate area for certification or recertification. Attach this information to the Application Form for Voluntary Certification when applying for certification or to the Recertification Application Form for recertification. **It is your responsibility to keep copies of records pertaining to your certification.** These records are valuable for validation purposes, and also as planning tools to identify your learning needs and decide how to meet them.

**SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS
PROGRAMS WITH PRIOR APPROVAL**

Name:	
Activity Date:	
Activity Name:	
Provider:	
Location:	
Instructor(s):	
Instructor or Provider Signature:	
Total Contact Hours:	
Continuing Education Areas	Contact Hours
Library Administration	
Library Services to the Public	
Collection Management	
Technical Services & Technology	
Other (please specify)	
Total Contact Hours	



**SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS
PROGRAMS WITH PRIOR APPROVAL**

Name:
Activity Date:
Activity Name:
Provider:
Location:
Instructor(s):
Instructor or Provider Signature:

Continuing Education Areas	Contact Hours
Library Administration	
Library Services to the Public	
Collection Management	
Technical Services & Technology	
Other (please specify)	
Total Contact Hours	

Name:
Activity Date:
Activity Name:
Provider:
Location:
Instructor(s):
Instructor or Provider Signature:

Continuing Education Areas	Contact Hours
Library Administration	
Library Services to the Public	
Collection Management	
Technical Services & Technology	
Other (please specify)	
Total Contact Hours	



D. SUMMARY OF CONTINUING EDUCATION ATTENDANCE RECORDS FOR PROGRAMS WITHOUT PRIOR APPROVAL

Directions: This form (pages 29 & 30 from the Manual for Voluntary Certification Program) must be completed to request continuing education credit for learning activities that have not received prior approval from the Screening Board. The form must be submitted to the Screening Board within 90 days of attending a program. After the Screening Board has approved the program, retain the approved form and attach a copy of it to the Summary of Continuing Education Attendance Records Form to include when you apply for certification or recertification. Fill out all sections of the form. Please type or print using black ink. If you have questions call the Voluntary Certification Program at Montana State Library at 444-5349. Send this form to: VOLUNTARY CERTIFICATION PROGRAM, MONTANA STATE LIBRARY, P.O. BOX 201800, HELENA, MONTANA 59620-1800.

GENERAL INFORMATION		Date:
Name:		
Last	First	Middle Initial
Mailing Address:		
Telephone No.:		

LEARNING ACTIVITY DESCRIPTION	(Attach a sheet if necessary.)
1. Program Information:	
Title:	
Date:	
Time(s):	

2. Instructor and Qualifications:
Instructor or Provider's Signature:





**VI. MONTANA PUBLIC LIBRARY RECOGNITION PROGRAM
FOR VOLUNTEERS, TRUSTEES, AND PAID LIBRARY STAFF**

A. GOALS OF THE RECOGNITION PROGRAM

The overall goal of the recognition program is to provide a way for librarians, library boards of directors, Federations, or the Montana Library Association to recognize volunteers, trustees, or paid library staff who have made significant contributions to their public library.

The goals of the recognition program are:

1. to motivate volunteers, trustees, and paid staff to develop library skills through basic and continuing education and to play an active role in their library;
2. to recognize volunteers, trustees, and paid staff for hours/years of library service;
3. to recognize volunteers, trustees, and paid staff for special achievements;
4. to recognize volunteers, trustees, and paid staff who, on a continuing basis, update their knowledge and skills in order to provide better library services to their communities; and
5. to enhance the image of public libraries.

B. CRITERIA FOR RECOGNITION

The broad criteria for recognition will be:

1. hours/years of library service; or
2. special achievements including publications.
3. library workshops, conferences, seminars, and training courses given and/or attended;
4. participation in library organization activities such as Federation or Montana Library Association meetings; and
5. continuing education activities such as independent study, home study, and/or credits earned in library related courses.

C. CATEGORIES FOR RECOGNITION

The categories for recognition will be:

1. Paid Staff

- a. years of service; or
- b. contact hours for continuing education activities supported by written documentation for every 20 hours; or
- c. special projects, activities, or achievements.

2. Volunteers

- a. hours of service with a minimum of 300 hours; or
- b. contact hours for continuing education activities supported by written documentation for every 10 hours; or
- c. special projects, activities, or achievements.

3. Trustees

- a. participation in state legislative activities; or
- b. special projects, activities, or achievements; or
- c. continuing education activities; or
- d. active participation in Federation activities; or
- e. years of distinguished service.

D. MONTANA PUBLIC LIBRARY RECOGNITION PROGRAM ACTIVITY FORM

Directions: To recognize a volunteer, trustee, or paid library staff person, complete all the sections of this form. Please type or print using black ink. If you have questions about the form call 406-444-5349. Send the completed form to: RECOGNITION PROGRAM, MONTANA STATE LIBRARY, P.O. Box 201800, HELENA, MONTANA 59620-1800.

Person to be Recognized:		
Name:		
Last	First	Middle Initial
Mailing Address:		

Position of Recognition:	<input type="checkbox"/> PAID STAFF	<input type="checkbox"/> TRUSTEE	<input type="checkbox"/> VOLUNTEER
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Activity Description: Describe the activity for which the person will be recognized. Include how that activity relates to their present position. Attach a continuation sheet if necessary.	
Activity Dates: From:	To:
Location:	

Submitted by:	
Name:	
Address:	Telephone:
Position:	
Signature:	Date:

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VII. GLOSSARY

CERTIFICATION: A process for recognition of attainment of prescribed levels of education and training.

CEU: Continuing Education Unit.

COMPETENCY: The ability to do something at some level of proficiency. It is usually composed of some combination of knowledge, understanding, skills, attitudes, and values.

CONFERENCE: A general type of meeting usually of one or more days' duration, attended by a fairly large number of people. The emphasis is on prepared presentations by authoritative speakers, although division into smaller group sessions for discussion purposes is often a related activity.

CONTACT HOUR: Fifty minutes of continuous participation. Credit is granted only for full contact hours.

CONTINUING EDUCATION: A lifelong learning process which builds on and modifies previously acquired knowledge, skills, and attitudes of the individual.

INFORMATION SCIENCE:** The study of the creation, use, and management of information in all its forms.

INSTITUTE: Similar to a conference, but more tightly structured. Emphasis on providing instruction in principles and techniques. Institute programs may have certain continuity, meeting on a yearly basis for example.

LECTURE: A carefully prepared oral presentation of a subject by an expert.

LIBRARIAN:** 1. A person responsible for the administration of a library. 2. The chief administrative officer of a library. 3. A class of library personnel with professional responsibilities including those of management, which requires independent judgment, interpretation of rules of procedure, analysis of library problems, and formulation of original and creative solutions, normally utilizing knowledge of library and information science represented by a master's degree.

LIBRARY CLERK:** A category of library personnel with general clerical and secretarial proficiencies who perform tasks related to library operations in strict accordance with established rules and procedures.

LIBRARY COLLECTION: The total accumulation of materials provided by a library for its target group. Synonymous with library holdings and library resources.

LIBRARY TECHNICAL ASSISTANT:** A class of library personnel with specific technical skills who perform tasks in support of library associates or associate specialists and higher ranks, following established rules and procedures, and including, at the top level, supervision of such tasks.

MEDIA: Materials in all formats and all channels of communication that serve as carriers of information.

PAID STAFF: All paid library employees.

PROGRAM: A planned continuing education activity which may include academic courses, home study courses, conferences, institutes, seminars, workshops, lectures, program sessions of library/information/media association meetings, and study groups.

PROVIDER: The person or organization that plans and/or delivers a program.

SEMINAR: A small group of people with the primary emphasis on discussion under a leader or resource person or persons.

STUDY GROUP: Planned program which provides for group participation on specific and limited topics on which participants make presentations before the group.

WORKSHOP: Usually meets for a continuous period of time over one or more days. The distinguishing feature of the workshop is that it combines instruction with laboratory or experimental activity for the participants. The emphasis is more likely to be on skill training rather than principles.

****Definitions for these terms taken from: Young, Heartsill, ed.
The ALA Glossary of Library and Information Science. Chicago:
American Library Association, 1983.**



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